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ABSTRACT

Procedures and information relevant to developing and maintaining a resource file for Social Security Administration workers are outlined. Specific information is given for compiling, indexing, and updating a resource file. Three lists of subject headings for indexi g are included. Also, supplemental reference material, including directories, is given. (WH)

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INFORMATION and *REFERRAL SERVICES* in *SSA DISTRICT* and *BRANCH OFFICES*

The information resource file: Compilation Indexing, and Updating

U.S. DEPARTMENT OF
HEALTH, EDUCATION, AND WELFARE
SOCIAL SECURITY ADMINISTRATION
BUREAU OF DISTRICT OFFICE OPERATIONS

SS PUB 25-72 (6-72)

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WRITTEN FOR SSA BY:

THE HEALTH AND WELFARE COUNCIL
OF CENTRAL MARYLAND, INC.

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Resources File and Supplementary Material

It is, at least theoretically, possible for an SSA worker unfamiliar with a community to direct a person in need to an appropriate local source of help when the worker has access to a comprehensive resources file supplemented by local maps and the like. The worker, however, should acquaint himself rapidly with the community resources in his service area because there is some variation from community to community, particularly in services provided outside the formal agency network.

An adequate resources file for an information and referral service must provide for: (1) the collection of comprehensive data on the services and programs of public agencies and private organizations as well as other community resources; (2) the indexing and storage of these data so as to allow for selective retrieval on demand; and (3) continual updating of the information.

In large metropolitan areas served by more than one SSA office, it is recommended that one file be compiled with copies for each office and that mechanisms be established to use the same procedure for updating the file, both for incorporating daily changes and for periodic verification of the entire file.

Information Needed for Resources File

It is essential that the resources file compiled for each SSA office contain information on all services provided by each agency within the following broad categories:

(1) Governmental agencies at all levels: Federal, State, regional, county, city, town, township. All governmental agencies serving the SSA office service area will not necessarily have offices within the area.

(2) Voluntary or private agencies and organizations. There usually are private family casework agencies; church-related groups of agencies, such as Associated Catholic Charities or Associated Jewish Charities; major health organizations, such as the American Cancer Society, the Heart Association, and the Mental Health Association; and organizations such as the Red Cross and the Salvation Army. Except in large metropolitan enclaves, their offices frequently serve several counties or even a whole State.

(3) Informal sources of help, such as churches which stock food for distribution in emergencies, an American Legion post which lends a hospital bed or wheelchair, dentists who will treat handicapped children, psychiatrists who do group therapy, stores which sell used clothing and furniture, and volunteer programs such as FISH and Hot Lines.

Compiling Resources File

Communities With I & R Services

In a community which has a comprehensive information and referral service, it is recommended that SSA negotiate with the I & R service to duplicate its resources file for the SSA office or offices serving the community. It is necessary, also, to provide for obtaining new information recorded by the I & R service as well as changes and corrections in the original file material, perhaps on a monthly basis. Over eighty information and referral services are associated with local United Way organizations in metropolitan areas across the country.

Communities With Directories of Services

Directories of community services frequently are published by the same agencies which operate I & R services in metropolitan areas and also are issued in many communities where no I & R service exists. Many such directories have been useful to SSA workers and usually may be used by the I & R coordinator as the base for the resources files. Most directories of community services are published under the auspices of the local United Way organization or by an independent association of community service agencies. They may cover an entire State, a region of a State, a county, or only a city or town.

These directories are published at intervals ranging from one to several years. Depending upon the size of the community covered, the process of preparing a new edition of a directory may take as long as a year. The information a directory contains, therefore, may be a year old by the time it is published. Only a few directory publishers issue periodic additions, corrections, and changes to subscribers on a regular basis. Also rare is the procedure of the Community Council of Greater New York which prints information updating its directory in another publication. In metropolitan areas where a directory is published independently of an I & R service, perhaps SSA can contract with the publisher to obtain information being compiled for the next edition.

Other Communities

Assembling a resources file for an SSA service area where neither a comprehensive I & R service nor directory of community service exists is difficult and time-consuming, involving a systematic survey of all community services. Help should be sought from any local agency which has collected information for its own use or any specialized I & R service.

Forty of the 320 Easter Seal Centers in the nation offer specialized I & R services, as do many local mental health associations and similar organizations. Others are operated for the internal use of an agency,

such as State or local health and social services or welfare departments. Less formally, public health nurses often are prime sources of information on local services. Medical social workers in hospitals generally maintain informational files for their own use, as do social workers in many other institutions and agencies. In addition, it is suggested that the following sources be checked for an existing compilation of information which can be used as a base for building a resources file by SSA:

Local governmental offices: town, city, township, county, region, State
Clergy: Ministerium, Chancery, Rabbinate, Council of Churches
Libraries
Schools
Medical society
Chamber of Commerce
Local military installations
Social service organizations or agencies, as listed in the yellow pages of the telephone book

Once a base of resources for the SSA service area is obtained from any of these sources, only supplemental items of information need to be added from the other sources. SSA probably will have to provide the staff to copy any files maintained by these agencies and organizations or contract with them to supply the information to SSA.

It is likely that the resources file thus assembled will have to be supplemented by information elicited directly from the agency providing the service by questionnaire and, in some cases, interviews with staff.

Where no resources base can be located among the agencies in the community, probably at least a beginning list of existing agencies can be obtained from a local United Way organization, association of community services, individual agency or social worker, or the yellow pages of the telephone directory. Then an agency-by-agency survey will have to be made by mail questionnaire, supplemented by interviews.

Questionnaire

To obtain the information needed from the list of agencies assembled, a questionnaire could be prepared which would provide all the data needed to index the services of each agency for the resources file. The questionnaire should cover all six items of information listed in CM 9307:

"1. Name of agency (cross-refer branches).
2. Agency address, telephone number and office hours for referrals.
3. Names of the director and other key contacts.
4. A precise and brief description of the services available.
5. Eligibility requirements.
6. Fees (if any) and any provision for waiver."

It is suggested that the list of subject headings to be used in the subject index of the resources file, as described in the following section, also be prepared at this stage and that this list be incorporated into the questionnaire. This list could be placed on a separate sheet, with space for checking Yes or No after each item to make certain that each agency reports on all services it provides. Space also should be provided for the agency to report any other services it offers.

It is usual to mail the questionnaire to most agencies, with follow-up as needed. The largest, most complex agencies, however, such as the social services or welfare department, the health department, and large hospitals, may require a visit by a staff member to get all the information needed.

1. 43-Item List of Subject Headings (Including 28 Subheadings)[1/]

Abortion
Adoption
Aged
  Homes, Counseling, and Special Services
  Recreation and Vacation Facilities
Alcoholism
Child Health Services
Chronically Ill
Civic Organizations
Common Services and Federations (including Neighborhood Councils)
Convalescent Care
Correctional Care
Day Care of Children (including Day Nurseries, Family Day care, Nursery Schools, Kindergartens, and After-School Programs)
Dependent Children
Employment and Vocational Guidance
Family Service and Public Assistance
Foreign-Born and Travelers
Handicapped
  Blind
  Deaf and Hard of Hearing
  Orthopedically Handicapped
  Speech
  Other Services
Health Administration and Education
Health and Hospital Clinics
Home Care Services
  Home Care Programs
  Homemaker-Home Health Aide Services
Homeless
  Men and Boys
  Women and Girls
Hospitals, General (including Medical Social Service)
Hospitals, Special (including Medical Social Service)
  Cancer
  Cardiac
  Contagion
  Eye, Ear, Nose, Throat
  Orthopedic
  Tuberculosis
  Women and Children

[1/] This list is used in the Directory of Social and Health Agencies of New York City, 1971-1972, published for the Community Council of Greater New York, Inc., by Columbia University Press, New York, 1971.

Housing
- General
- Residences for Men and Boys
- Residences for Women and Girls
- Room Registries

Information Services
Legal Aid
Maternity Services (including Hospitals, Prenatal and Postnatal Clinics, Special Nursing Services)
Mental Health
- Aftercare Clinics of State Department of Mental Hygiene
- Hospitals for the Mentally Ill
- Licensed Psychiatric Clinics
- Other Mental Health Services

Narcotic Addiction
Nursing Services
Poverty Programs
Protective Care
Recreation, Group Work, Settlements, Neighborhood Centers
Rehabilitation Services
Remedial Education
Residential and Day Treatment Centers for Children
Retarded Children and Adults (including Institutions and other Services)
Seamen
Sheltered Workshops
Shelters, Temporary, for Children
Unmarried Parents
Vacation Services
- Day Camps and Play Schools
- Overnight Camps (including Camp Placement and Referrals)

Volunteer Services

2. 72-Item List of Subject Headings [1]

Abortion Services (includes pregnancy testing, counseling, referrals)
Adoption Services
Agency Information
Animal Care Services
Big Brother Service
Blood Service
Board and Room
Camping
Careers Information
Clinic-Medical
Clinic-Mental
Clinic-Dental
Clothing
Commercial Enterprises (inquiries about, including complaints)
Complaint-Agency Service
Correctional and Court Services
Counseling-Family
Counseling-Marriage
Counseling-Personal
Day Care or Nursery School (for children)
Disaster Services
Drug Abuse Services
Education-Formal
Education-Informal (including consumer and health education, remedial, tutorial programs)
Education-Special (for handicapped persons)
Employee Wanted
Employment Services (including counseling, testing, placement)
Financial Aid-Burial
Financial Aid-Continuing (includes food stamps, discounts for aged, except medical)
Financial Aid-Education
Financial Aid-Emergency (food, shelter, etc.)
Financial Aid-Holiday
Financial Aid-Medical (includes Medical Assistance Program, discounts for aged)
Food
Foster Care (for children, unwed pregnant girls, adults needing care; also those offering homes)
Fund Campaigns
Furniture
General Information (inquiries which cannot be assigned to any specific category)
Group Work Service

[1] This list is used by the Information and Referral Service of the Health and Welfare Council of Central Maryland, Inc.

Health Appliances and Equipment
Health Information
Health Insurance
Home Care (hospital-sponsored care of ill in own homes)
Homemaker-Home Health Aide Service
Homes for Aged (residential, not nursing homes)
Hospital-Chronic
Hospital-General
Hospital-Mental
Housing
Intercultural and Anti-Discrimination Services
Legal Services
Meals-on-Wheels
Municipal Services
Neighborhood Community Organization Services
Nursing Service (in own home)
Nursing or Convalescent Care (in nursing or convalescent facilities)
Offers (donor counseling, including overseas child maintenance programs)
Physical Therapy
Professional Practitioners
Protective Services
Recreational and Leisure Time Services
Residential Treatment Center
Rehabilitation Services
Retirement and/or Disability Benefits (includes Social Security, Railroad Retirement, Veterans Administration, Workmens Compensation)
Self-Help Services (includes organizations such as Alcoholics Anonymous, Recovery, Inc.)
Sheltered Workshop
Transportation
Unemployment Insurance
Vital Statistics
Volunteer Services

150-Item list of Subject Headings[1]

Subject headings are printed in all capital letters; others are cross references

Accident Prevention	See SAFETY SERVICES
ADOPTION SERVICES	
Aged - Homes	See RESIDENTIAL CARE - AGED
AGED - NONRESIDENTIAL SERVICES	
Air Pollution	See ENVIRONMENTAL CONTROL
ALCOHOLISM SERVICES	
AMBULANCE SERVICES	
ANIMAL BITES	
Antisemitism	See INTERGROUP RELATIONS
ARBITRATION, CONCILIATION, AND MEDIATION	See also INTERGROUP RELATIONS
Armed Forces Personnel	See MILITARY PERSONNEL AND DEPENDENTS SERVICES
Attorneys	See LAWYERS
Birth Certificates	See PUBLIC HEALTH
Blind	See VISUALLY HANDICAPPED SERVICES
BLOOD DONOR SERVICE	
Bookmobile	See LIBRARY SERVICES
Budgeting	See COUNSELING AND GUIDANCE SERVICES
BURIAL SERVICES	
Business Development	See ECONOMIC DEVELOPMENT
CAMPING	See also: HANDICAPPED - SERVICES HEALTH SERVICES, VOLUNTARY RETARDED - NONRESIDENTIAL SERVICES RETARDED - RESIDENTIAL CARE
Central Financing	See FUND RAISING AND CENTRAL FINANCING
CHILDBIRTH - PREPARATION	
Child Abuse	See FOSTER CARE AND PROTECTIVE SERVICES CHILDREN
Children's Homes	See RESIDENTIAL CARE - DEPENDENT CHILDREN RESIDENTIAL CARE- EMOTIONALLY DISTURED CHILDREN
CHRISTMAS ASSISTANCE	
CIVIC AND COMMUNITY ORGANIZATIONS	
Civil Defense	See DISASTER SERVICES
CIVIL SERVICE	
CLINICS	See also HOSPITALS

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[1]This list is used in the Directory of Community Services in Maryland, 1970, Health and Welfare Council of Central Maryland, Inc., 200 E. Lexington Street, Baltimore, Maryland 21202.

CLOTHING, FOOD, AND HOUSEHOLD GOODS	
Clubs, Youth	See LEISURE TIME SERVICES
Colleges and Universities	See EDUCATION
COMMUNITY ACTION PROGRAMS	
Community Centers	See LEISURE TIME SERVICES
Community Development Services	See PLANNING AND COMMUNITY DEVELOPMENT SERVICES
Community Relations	See INTERGROUP RELATIONS
Complaints	See CONSUMER EDUCATION AND PROTECTION
Conciliation	See ARBITRATION, CONCILIATION, AND MEDIATION
CONSUMER EDUCATION AND PROTECTION	
CORRECTIONAL SERVICES - ADULTS	
COUNSELING AND GUIDANCE SERVICES	
Counseling, Youth Volunteers	See YOUTH COUNSELING VOLUNTEER
COURTS	See also: CORRECTIONAL SERVICES - ADULTS DELINQUENT AND PREDELINQUENT YOUTH SERVICES
Crafts	See LEISURE TIME SERVICES
Crisis Services	See DISASTER SERVICE
Day Care	See AGED - NONRESIDENTIAL SERVICES DAY CARE - CHILDREN HANDICAPPED - SERVICES HEALTH SERVICES, VOLUNTARY RETARDED - NONRESIDENTIAL SERVICES
DAY CARE - CHILDREN	See also: HEALTH SERVICES, VOLUNTARY HANDICAPPED - SERVICES RETARDED - NONRESIDENTIAL SERVICES
Deaf	See HEARING AND SPEECH HANDICAPPED - SERVICES
Death Certificates	See PUBLIC HEALTH
DELINQUENT AND PREDELINQUENT YOUTH SERVICES	
DENTAL SERVICES	
Dependent Children - Residential Care	See RESIDENTIAL CARE - DEPENDENT CHILDREN
Disabled	See HANDICAPPED - SERVICES
DISASTER SERVICES	
Discrimination	See INTERGROUP RELATIONS
DRAFT COUNSELING	
Drama	See LEISURE TIME SERVICES
DRUG ADDICTION SERVICES	
Drugs	See HEALTH APPLIANCES, EQUIPMENT, AND DRUGS

ECONOMIC DEVELOPMENT	
Economic Planning	See PLANNING AND COMMUNITY DEVELOPMENT SERVICES
EDUCATION	
EDUCATIONAL BROADCASTING	
Emergency Services	See DISASTER SERVICES
Emotionally Disturbed - Residential Care	See RESIDENTIAL CARE - EMOTIONALLY DISTURBED CHILDREN
Emotionally Disturbed - Services	See MENTAL HEALTH AND PSYCHIATRIC SERVICES
EMPLOYMENT AND VOCATIONAL GUIDANCE SERVICES	
Employment, Sheltered	See SHELTERED EMPLOYMENT
ENVIRONMENTAL HEALTH	
Eye Bank	See VISUALLY HANDICAPPED - SERVICES
Eye Glasses	See HEALTH APPLIANCES, EQUIPMENT, AND DRUGS VISUALLY HANDICAPPED - SERVICES
FAMILY PLANNING SERVICES	
Family Relations	See COUNSELING AND GUIDANCE SERVICES
Films	See LIBRARIES: LIBRARY SERVICES
FINANCIAL ASSISTANCE	See also: HEALTH SERVICES, VOLUNTARY HANDICAPPED - SERVICES RETARDED - NONRESIDENTIAL SERVICES
Food	See CLOTHING, FOOD, AND HOUSEHOLD GOODS
FOREIGN BORN - SERVICES	
FOSTER CARE AND PROTECTIVE SERVICES - CHILDREN	
FUND RAISING AND CENTRAL FINANCING	
Furniture	See CLOTHING, FOOD AND HOUSEHOLD GOODS
Group Work Services	See LEISURE TIME SERVICES
Half Way Houses	See RESIDENCES - HALF WAY HOUSES
HANDICAPPED - SERVICES	
HEALTH APPLIANCES, EQUIPMENT, AND DRUGS	
Health Insurance	See INSURANCES
HEALTH SERVICES - VOLUNTARY	See also: HANDICAPPED - SERVICES RETARDED - NONRESIDENTIAL SERVICES
Hearing Aids	See HEALTH APPLIANCES, EQUIPMENT AND DRUGS
HEARING AND SPEECH HANDICAPPED - SERVICES	

HOMEMAKER AND HOME HEALTH AIDE SERVICES	
Homes for the Aged	See RESIDENTIAL CARE - AGED
Hospital Equipment	See HEALTH APPLIANCES, EQUIPMENT AND DRUGS
HOSPITALS	
Household Goods	See CLOTHING, FOOD, AND HOUSEHOLD GOODS
HOUSING	
Immigrants	See FOREIGN BORN - SERVICES
INFORMATION AND REFERRAL SERVICES	
INSURANCES, INCLUDING SOCIAL INSURANCES	
Intercultural Relations	See INTERGROUP RELATIONS
Interfaith Relations	See INTERGROUP RELATIONS
INTERGROUP RELATIONS	
Interracial Relations	See INTERGROUP RELATIONS
Job Training	See EMPLOYMENT AND VOCATIONAL GUIDANCE SERVICES
LAWYERS	See also LEGAL SERVICES
Layettes	See CLOTHING, FOOD, AND HOUSEHOLD GOODS
LEGAL SERVICES	See also LAWYERS
LEGISLATIVE REFERENCE SERVICES	
LEISURE TIME SERVICES	
LIBRARIES	
LIBRARY SERVICES	See also LIBRARIES
Loan Closet	See CLOTHING, FOOD, AND HOUSEHOLD GOODS HEALTH APPLIANCES, EQUIPMENT, AND DRUGS
Loans, Scholarship	See SCHOLARSHIPS AND LOANS
Manpower Development	See EMPLOYMENT AND VOCATIONAL GUIDANCE SERVICES
Marriage Certificates	See PUBLIC HEALTH
Marriage Counseling	See COUNSELING AND GUIDANCE SERVICES
Maternity Homes	See UNMARRIED PARENTS - SERVICES
MEALS-ON-WHEELS	
Mediation	See ARBITRATION, CONCILIATION, AND MEDIATION
Medical Assistance Program	See FINANCIAL ASSISTANCE
Medicare	See INSURANCES
Medications	See HEALTH APPLICANCES, EQUIPMENT AND DRUGS
MENTAL HEALTH AND PSYCHIATRIC SERVICES	See also RESIDENTIAL CARE - EMOTIONALLY DISTURBED CHILDREN
Mentally Ill	See MENTAL HEALTH AND PSYCHIATRIC SERVICES
MIDWIVES	
Migrants - Services	See TRANSIENTS AND TRAVELERS - SERVICES

MILITARY PERSONNEL AND DEPENDENTS - SERVICES	
MISSING PERSONS	
Music	See LEISURE TIME SERVICES
	EDUCATION
Narcotics	See DRUG ADDICTION SERVICES
Neglected Children	See FOSTER CARE AND PROTECTIVE SERVICES - CHILDREN
	DELINQUENT AND PREDELINQUENT CHILDREN - SERVICES
Nursery Schools	See DAY CARE - CHILDREN
NURSES	
NURSING HOMES	
NUTRITION SERVICES	
OCCUPATIONAL THERAPY	
PARENT GROUPS	See also HEALTH SERVICES, VOLUNTARY
Parks and Playgrounds	See LEISURE TIME SERVICES
Parole	See CORRECTIONAL SERVICES - ADULTS
PHYSICAL THERAPY	
Physically Handicapped	See HANDICAPPED - SERVICES
PHYSICIANS	
PLANNING AND COMMUNITY DEVELOPMENT SERVICES	
POISON CONTROL CENTERS	
POLICE	
Poverty - Services	See PLANNING AND COMMUNITY DEVELOPMENT SERVICES
Prisoners - Services	See CORRECTIONAL SERVICES - ADULTS
Prisons	See CORRECTIONAL SERVICES - ADULTS
Probation - Adults	See CORRECTIONAL SERVICES - ADULTS
Protective Services - Adults	See AGED - NONRESIDENTIAL SERVICES
Protective Services - Children	See FOSTER CARE AND PROTECTIVE SERVICES - CHILDREN
Psychiatric Care	See MENTAL HEALTH AND PSYCHIATRIC SERVICES
Psychiatrists	See PHYSICIANS
PSYCHOLOGISTS	
Public Assistance	See FINANCIAL ASSISTANCE
PUBLIC HEALTH	
PUBLIC HEALTH NURSING	
PUBLIC WELFARE	
Race Relations	See INTERGROUP RELATIONS
READING - REMEDIAL	See also TUTORING

Recordings	See LIBRARIES; LIBRARY SERVICES
Recreational Services	See LEISURE TIME SERVICES
Refugees	See FOREIGN BORN - SERVICES
Rehabilitation Services	See VOCATIONAL REHABILITATION
Relocation	See HOUSING
RESIDENCES - HALF WAY HOUSES	
RESIDENCES - MEN	
RESIDENCES - WOMEN AND CHILDREN	
RESIDENTIAL CARE - AGED	
RESIDENTIAL CARE - DEPENDENT CHILDREN	
RESIDENTIAL CARE - EMOTIONALLY DISTURBED CHILDREN	
RESIDENTIAL CARE - RETARDED	
RETARDED - NONRESIDENTIAL SERVICES	
SAFETY SERVICES	
SANITATION	
SCHOLARSHIPS AND LOANS	
Schools	See EDUCATION
SELF-HELP PROGRAMS	
SHELTERED EMPLOYMENT	
Shelters	See RESIDENCES
Social Security	See INSURANCE
Speech Defects	See HEARING AND SPEECH HANDICAPPED - SERVICES
Theater	See LEISURE TIME SERVICES
Thrift Shops	See CLOTHING, FOOD, AND HOUSEHOLD GOODS
Training	See EMPLOYMENT AND VOCATIONAL GUIDANCE - SERVICES
TRANSIENTS AND TRAVELERS - SERVICES	
Translation Services	See TRANSIENTS AND TRAVELERS - SERVICE
Transportation Services	See HANDICAPPED - SERVICES HEALTH SERVICES, VOLUNTARY RETARDED - NONRESIDENTIAL SERVICES VOLUNTEER SERVICES
TUTORING	
Underemployed	See EMPLOYMENT AND VOCATIONAL GUIDANCE SERVICES
Unemployment Insurance	See INSURANCES
UNMARRIED PARENTS - SERVICES	
Urban Planning	See PLANNING AND COMMUNITY DEVELOPMENT SERVICES
Urban Renewal	See PLANNING AND COMMUNITY DEVELOPMENT SERVICES
Vaccination	See PUBLIC HEALTH
VETERANS AND DEPENDENTS - SERVICES	

VISUALLY HANDICAPPED - SERVICES — See PUBLIC HEALTH
Vital Statistics — See PUBLIC HEALTH
Vocational Guidance — See EMPLOYMENT AND VOCATIONAL GUIDANCE SERVICES

VOCATIONAL REHABILITATION — See EMPLOYMENT AND VOCATIONAL GUIDANCE SERVICES
VOLUNTEER SERVICES
Water Pollution — See ENVIRONMENTAL HEALTH
Welfare — See PUBLIC WELFARE
Work Experience and Training Programs — See EMPLOYMENT AND VOCATIONAL GUIDANCE SERVICES

Workmen's Compensation — See INSURANCES
YOUTH COUNSELING, VOLUNTEER
Zoning — See PLANNING AND COMMUNITY DEVELOPMENT SERVICES

Indexing Resources File

Once the information on community resources is gathered, indexing is the key to successful referrals. In a file containing more than a few entries, an alphabetic listing by agency name alone will not facilitate the rapid location of all possible sources of help for a person needing food, transportation, financial aid, counseling, or whatever.

The real working file in an I & R service is the subject file. The adequacy of the subject indexing determines the usefulness of the resources file in making appropriate referrals.

File Format

Depending upon the size of the SSA office, the format of the file may be a simple looseleaf notebook, a Rolodex wheel card file, a flexoline tally or an extensive system of file cards. If a looseleaf notebook is used, each listing should be on a separate sheet of paper to permit changes, corrections, and additions. For a card file, a 5" x 8" or larger card is recommended to allow space for all the information needed per entry.

Alphabetic Index

The process of indexing begins with an alphabetic listing by name of all agencies and organizations in the community. The alphabetic entry is the master listing for each agency and should contain the following information per GM 9303:

"1. Name of agency (cross-refer branches).
2. Agency address, telephone number and office hours for referrals.
3. Names of the director and other key contacts.
4. A precise and brief description of the services available.
5. Eligibility requirements.
6. Fees (if any) and any provision for waiver."

To allow for systematic updating of the file, it is essential that the alphabetic entry contain two additional items of information: (1) the date the information is recorded; and (2) a notation of each subject file entry to be prepared, because each type of service an agency provides must be a separate subject file entry. The latter can be achieved by underlining key words in item #4 above or by adding an item #7 entitled "Also Filed Under" or "Indexed Under" where all subject file entries are listed. In addition, whenever SSA has worked out an agreement with an agency for SSA workers to follow a specific procedure for referring clients to a particular type of service offered by the agency, this information must be included in the master file entry on the agency.

Subject Index

The subject index consists of an alphabetic list of types of services each followed by an alphabetic list of all agencies in the community which provide each type of service. If the file is a loosleaf notebook, each type of service, followed by a list of agencies providing it, appears on a separate sheet. In a card file, separate cards for each agency are filed behind the card containing the subject entry, which should be a different color or otherwise distinguishable.

In the simplest subject index, only the name of the agency is listed under each subject entry, and the worker refers back to the master alphabetic list for the address, telephone number, and other information about the agency.

Inclusion of all information in the master alphabetic file entry for each agency listed under each subject, including special agreements made by SSA for referring clients needing a particular service, may be desirable in a large SSA office where many workers use the file or where speed is important. One I & R service which selected this procedure uses Xerox equipment to make as many copies of the master card as there are subject entries for the agency. The cards for all entries are identical except that the subject heading under which it is to be filed is underlined in red.

Regardless of the file format, it is essential that the terms used in designating types of services on the master alphabetic entry be identical to the headings used in the subject index.

Subject Index Headings

A list of types of services, or subject headings, must be prepared before beginning to index the resources file. It is helpful to start work with a standard list of subject headings, adding others as needed for a particular community.

In spite of the diversity of characteristic life patterns among communities, there appear to be certain basic needs for services which do not vary appreciably from one locale to another. Lists of types of services, worked out by a number of I & R services for their own indexing and statistical recording use, look very much alike.

Three lists of differing lengths are presented below as examples. The SSA Coordinator might elect to use one of these lists of terms in indexing the resources file, or he may devise a list more suited to local circumstances. Whatever list of terms is selected, it must be consulted continually during the indexing process. The terms used for the subject headings become the basic vocabulary, or thesaurus, as librarians call it, of the file system.

Updating Resources File

The process of updating the resources file is a continual one as workers learn of changes in the information it contains. For example, a new service offered by an agency or the formation of a new organization may be reported in a newspaper or an agency newsletter. Through making arrangements for a client or through the client himself, a worker may find out about a new office location, telephone number, or a change in hours or eligibility requirements of an agency. Since it is unrealistic to expect agencies to notify the SSA office of such changes, workers must be alert to them and be responsible for adding new information to the resources file or altering information it already contains. As in the initial indexing, the date of the change or addition must be noted and the subject entries must agree with the master alphabetic entry. In the case of a new agency, a questionnaire should be sent to obtain complete information on its services.

In addition, it may be desirable to establish a procedure for periodic, systematic verification of all information contained in the resources file to elicit changes in services which have not otherwise come to the attention of workers. The interval can be yearly or biyearly, depending somewhat upon time available. A choice also must be made between doing the entire alphabetic file at once or on a rotating basis, beginning at the end of the first or second year of operation and continuing thereafter. For example, a certain portion of either the alphabet or file could be scheduled for updating each month. It may be both practical and educational to assign a few of the agencies to be updated to each interviewer for update action. This would help maintain awareness of available community services.

Shown here are two alternative methods of updating the information:
(1) Send the same questionnaire used to obtain the original information to the agency, requesting the agency either to fill it out completely again or to note only the changes on it. A drawback to the latter request is that the individual receiving it may unintentionally not report all changes because he does not recall the information previously supplied.
(2) A copy of the information on file can be sent to the agency, asking for changes in and additions to it.

Whether or not it is necessary to make changes in the file entry, the date of review should be noted. Where drastic changes have occurred in the services offered by an agency, a completely new entry should be substituted. Agreement between alphabetic and subject entries is as essential as it was during the initial indexing.

Regardless of the method selected for updating, judgment has to be exercised in deciding whether to seek verification of information which has been obtained from an agency in between scheduled updatings. For example, if a new agency has completed a questionnaire sent by the I & R worker giving full information on the agency's services 1 or 2 months earlier, the agency staff might be antagonized if they are asked to do so again.

Supplemental Reference Material

Besides the information contained in the resources file, certain other materials are useful to I & R workers. Some of the following suggested materials will be of daily use in the SSA office. Others will be needed so seldom that they need not be kept on hand.

Maps

Detailed maps of the entire service area may be useful so that the worker can locate both services and clients, according to postal zones, election districts, census tracts, agency district or boundary lines, and transportation and highway routes. Up-to-date maps showing recently built developments and new streets should be sought, as well as maps which identify neighborhood names which may not be official town names. Such maps are available from a variety of sources, such as city or county departments of planning and zoning, State highway departments, bookstores, the U.S. Geological Survey, real estate boards, and election supervisors. In metropolitan areas, agencies which use Census tracts as boundary lines, such as some city health departments, may have Census tract books which identify any address in the area according to the Census tract in which it lies. Used in conjunction with a Census tract map, such a book is enormously helpful to the I & R worker who must locate an unfamiliar address in order to know what sources of help are near the client.

Experienced I & R workers eventually develop a sort of mental map on which they can locate frequently used resources in relation to the address of a client. This information is difficult to transmit. Sticking numbered markers on a map may help, if the map is large enough and the community's resources not too complex. In a complex urban community, no single way has been found to map resources on even the largest-scale map available. Transparent overlays, each showing a different set of information, are sometimes used, but usually are not very satisfactory.

Lists for Desk Files

It is helpful for the worker to keep lists of certain frequently used information at hand, possibly in a notebook or set of desk files. The following are suggested:

- List of licensed adoption agencies in State.
- List of FHA housing projects providing rental housing for aged, middle-, and low-income families.
- List of licensed nursing homes, by area and by category of nursing care.
- List of licensed day nurseries.
- List of loan closets for hospital and health equipment.
- List of trade unions, by local #--frequent calls intended for a union health and welfare fund are received by agencies with similar name.
- Telephone directories for municipal, county, State, and local Federal offices, especially listing the numbers of staff in large departments such as welfare and health departments.

Census tract book (and map).
City street directory.
Tables showing income limits for eligibility for certain programs, such as food stamps, medical assistance, public housing.
Directory of law enforcement agencies (distributed by telephone company).
Telephone directory(ies) for entire service area.
Health clinic schedules, especially chest, TB, venereal disease.
Rosters of members of State legislature, county council or commissioners, city council or town commissioners, giving districts, office addresses, and telephone numbers.

Directories and Other Reference Books

Of the reference materials listed below, many will be so infrequently used that their purchase is not warranted. It would be helpful, however, to know of their existence and, if possible, where the nearest copy is located (agency, library, school, etc.). For example, the Directory For Exceptional Children lists residential treatment centers for handicapped children. The nearest Easter Seal Treatment Center probably would have a copy, and information from the directory could be obtained by telephone when needed, for the directory is too expensive to justify its purchase unless it is heavily used.

1. National

American Dental Directory
American Dental Association, Chicago, Illinois

American Medical Directory
A Register of Legally Qualified Physicians in the United States.
American Medical Association, 535 N. Dearborn St., Chicago, Illinois 60610

American Association of Medical Clinics
Directory, Charlottesville, Virginia

Camp Directory
Camping Association, Bradford Woods, Martinsville, Indiana

Child Welfare League of America Directory of Member Agencies
Child Welfare League of America, Inc., 67 Irving Pl., New York, N.Y. 10003

Directory of Agencies Serving Visually Handicapped Persons in the United States
American Foundation for the Blind, 15 West 16 St., New York, N.Y. 10011

Directory of Birth Defect Centers
National Foundation - March of Dimes

Directory of Camps for the Handicapped
National Society for Crippled Children and Adults

Directory for Exceptional Children
Porter Sargent, 11 Beacon Street, Boston, Mass. 02108

Directory of Facilities for the Mentally Ill and the Mentally Retarded in the United States
American Psychiatric Association

Directory of Jewish Health and Welfare Agencies
Council of Jewish Federations and Welfare Funds, 315 Park Avenue S., New York, N.Y. 10010

Directory of Legal Aid and Defender Services
National Legal Aid and Defender Association, American Bar Center, 1155 E. 60 St., Chicago, Ill. 60637

Directory of Local Health and Mental Health Units
U.S. Public Health Service

Directory of Maternity Homes and Residential Facilities for Unmarried Mothers
National Council on Illegitimacy, 44 E. 23 St., New York, N.Y. 10010

Directory of Medical Specialists Certified by American Boards
New York, Columbia University Press

Directory of Member Agencies
National Federation of Settlements and Neighborhood Centers, Inc., 232 Madison Ave., New York, N.Y. 10016

Directory of Poison Control Centers
U.S. Public Health Service

Directory of Social and Health Agencies of New York City
Published for the Community Council of Greater New York, Inc., by Columbia University Press, New York

Encyclopedia of Associations
Three volumes, Gale Research Co., Detroit, Michigan

Encyclopedia Almanac
New York Times

Federal Benefits for Veterans and Dependents
U.S. Veterans Administration

The Guide Issue
A Directory of U.S. and Canadian hospitals. American Hospital Association, 840 N. Lake Shore Dr., Chicago, Ill. 60611. Published annually as Part II of the August issue of Hospitals, the official journal of the association.

Hospitals Directory of American and Canadian Hospitals
American Hospital Association, Chicago, Illinois

The Guide to Summer Camps and Summer Schools
17th ed. Porter Sargent, 11 Beacon St., Boston, Mass. 02108

Area Council on Alcoholism
Directory of Services for the Alcoholic

Arrow Street Guide
R.L. Polk

Bar Association (State)
State Lawyer's Manual

Catholic Diocese Chancery Office
Catholic Directory

Chamber of Commerce
Directory of Civic and Service Organizations, Directory of Professional Organizations

Council of Churches
Directory of Churches

Councils of Social Agencies (County)
Directory of Community Services and Organizations

Dentistry, School of (local universities)
Dental Service Programs in Community

Directories of local communities
R.L. Polk & Co.

Education, Department of (State)
Directory of School Officials

Education, Department of (State and Local)
Directory of Nonpublic schools (licensed private schools)
Directory of Public schools

Health, Department of (State)
Directory of licensed institutions
Directory of licensed nursing homes
Directory of licensed day nurseries
Directory of facilities for residential care of retarded
Directory of facilities for residential care of handicapped

Health and Welfare Council
Directory of Community Services

Hospital Association (State)
Directory of Hospitals and Medical Facilities

Juvenile Court (City, County, State)
Services of the Juvenile Court

Mental Hygiene, Department of (State)
Directory of Services for the Alcoholic in State
Directory of Mental Health Facilities in State

The Handbook of Private Schools
51st ed. Porter Sargent, 11 Beacon St., Boston, Mass. 02108

Illustrated Medical Dictionary
William A.N. Dorland, Philadelphia, Pa., W.B. Saunders

International Halfway House Association Directory

The Official Catholic Directory
P.J. Kennedy & Sons, New York 1971

The Public Welfare Directory
American Public Welfare Association, 1313 E. 60 St., Chicago, Illinois 60637

Referral Manual For Socio-Legal Services
U.S. Office of Economic Opportunity

Roget's International Thesaurus
3rd ed., Thomas Y. Crowell Co.

Service Directory of National Organizations, Voluntary and Governmental
10th ed. National Assembly for Social Policy and Development, Inc., 345 E. 46th St., New York, N.Y. 10017

Stedman's Medical Dictionary
21st ed. Williams and Wilkins

The Underground Dictionary
Eugene E. Landy, Ph.D., New York, Simon & Schuster (Touchstone paperback edition, 1971 $1.95)

U.S. Govt. Congressional Directory

U.S. Census of Population 1970
U.S. Bureau of the Census (Statistical Abstract)

U.S. Govt. National Zip Code Directory

U.S. Govt. Organization Manual
For sale by the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402

2. State and Local

Aging, Commission on (State)
Directory of Golden Age and recreation centers for aging

American Camping Association - State Section
Directory of Camps Serving (State)

Municipal League (State)
Directory of Municipal Officials

Planning and Zoning, Department of (City, County)
Publications about City (County) and its people, businesses, resources

Psychiatrists, Association or Society of Private Practicing (State)
Psychiatric Directory

Psychologists, Board of Examiners of (State)
Roster of Certified Psychologists

Public Welfare, (Social Services), Department of (State, Local)
Manuals

Regional Planning Council (Council on Government)
Publications on area resources

State Government
Manual or handbook